



# *The Board Plans*

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The board has no job more important than long-range planning for the library. The library board is responsible to set the broad parameters within which the library will operate, and you haven't done that if you don't have a long-range plan in place.

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- The long-range plan will be the basis for many other board functions.
- The board writes policies based on the mission statement and long-range goals.
- The board prioritizes the use of library resources through a plan.
- The board sets the stage for programs and services through a plan.
- Staff, director and board stay on the same track with a mission and plan.
- The board monitors progress of the library with the goals.
- The board maintains accountability to the community through the plan.

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*Planning  
is an  
exercise  
of leadership*

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Long-range planning must be much more than an informal discussion about what the library ought to be doing in the years ahead. Good planning has to follow a very orderly and formal process.

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*Long-range  
planning  
is a formal  
process*

Your board should hold at least one long-range planning meeting per year. This meeting will include the director and other key staff and be used to write a long-range plan or modify the existing goals.

You should be ready to merge your personal goals for the library with the personal goals of the rest of the board team. You should also

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be ready to work for a consensus with the rest of the planning team about the goals that you will set for the library. A library must have only one set of long-range goals to shoot for.

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***Good  
planning  
takes time***

The annual long-range planning session will probably include the board, director, staff and other resource people and last as long as one or even two days.

In that special planning meeting you should be ready to set aside the limitations that you struggle with monthly in your board meetings. You will be asked to dream about the future of the library and then plan how you will make those dreams reality over the next three to five years.

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***Essential  
elements of  
a good  
long-range plan***

An action-oriented long-range plan is so much more than a statement of the philosophies of the board about how the library will operate. The final plan you approve should...

- be truly long-range. Planning for next year is not long-range. Your plan should include at least the next three to five years. The goals you set should be broad enough and visionary enough that they will take some time to complete. Your director and staff will then build their annual objectives for the library based on your long-range goals. The technology plan is planned for 3 years, the long range plan can be for up to five years.

- be flexible. It is a common misconception that a long-range plan, once written, is locked into place and not changed. Consider your library's long-range plan a flexible and changeable document.

When you review your plan six months or a year after you write the goals and objectives, one of your tasks will be to modify the plan as necessary to reflect changes that have occurred in the library since you wrote the original plan. If you planned to remodel a building in three years, you may discover that a sudden increase in revenues allows you to remodel now. Or you may discover that a sudden

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shortfall of revenues forces you to extend your objective a couple of years. Keep the goal and change the objective.

- have accountability. Every objective you write should be measurable so that you can tell if it was completed or not. Each goal will then have objectives or action plans that will be specific, time-limited and spell out a responsible party for completion of the objectives or actions described.

Note the sample goal and its objective with specific accountability. Goal: To seek additional non-tax funding for library materials. Objective: Within five years our library will have an endowment fund that contributes to the library an amount equal to at least 10 percent of the annual materials budget."

- be visionary. Long-range planning means thinking big. That's tough for library boards struggling with paying the bills and keeping the doors open, but a plan without vision is worse than no plan at all. Vision requires you to forget the budget constraints for at least a little while and dream about what your library could be. Vision and progress always requires some risk, but you can't steal second with your foot on first.

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The mission statement is the first step in long-range planning. Your library has a mission that should be in writing, stating clearly the reason the library exists and the vision that the board holds for the future of the library.

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*A plan  
for  
planning*

The mission statement is not a fuzzy piece of philosophy, but a clear statement of where this library wants to go. It states the difference this library will make by its existence. The mission statement is the cornerstone around which all other planning for the library takes place.

After you have the current mission statement reviewed or a new statement written, you should take a hard look at where your library is right now. This self-examination should look at strengths and weaknesses of the library, opportunities for the library and threats to the continued operation of the library.

Your self-examination should also look at the external influences that impact the library. Your community is important. You will



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need a strategy for researching your community's needs, e.g., what social conditions will have an impact? What will the current political climate do to your library? Is there competition for your programs and services? How will the economy and the demographics of your community affect your library? What are the trends among libraries?

When you have a clear picture of where your library is right now, it's time to write goals. Goals will grow out of the results of your self-examination. Goals should take advantage of opportunities, build on strengths, correct weaknesses, and prepare for threats to the library.

A good plan will limit the number of goals to a handful. Then, if you write 5-10 objectives each year, you'll have enough to do. Remember, planning is an ongoing process and you'll be back next year to add to your plan.

To carry the goals into action, you should assign responsibility for each goal to either a standing committee of the board or to a special action task force. The committees and task forces are then responsible to write action strategies to make the goal happen.

For example, a goal to make all library facilities accessible to handicapped persons should have a clear list of objectives and actions necessary to complete the goal. The committees might decide they need a feasibility study of facilities, a cost estimate of the renovations and a plan for raising the necessary cash. Those actions are assigned a completion date and a person or persons responsible for completion.

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Good planning sometimes requires an outside perspective to keep the team on target and productive. An outside facilitator can force the team to be objective and write clear goals. College staff, corporate planners and other professionals can help you write a good plan.

The Public Library Association has published *The New Planning for Results* (2001), a planning process for public libraries that includes the planning process, public library services responses, a tool kit and workforms. Planning emphasizes the connection between needs that exist in a community and the services that a library offers. Libraries using this planning process should select among thirteen service responses for focus during the planning cycle and identify resource allocations for these services. The service responses listed below describe most of the services offered by public libraries:

## ***Get help to do your planning***

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*The New Planning for*

*Results: A*

*Streamlined Approach*

*Sandra Nelson, ALA, 2001*

*Strategic Planning for Results ,*

*Sandra Nekson, ALA, 2008*

*See page 6*

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- Basic Literacy
  - Business and Career Information
  - Commons
  - Community Referral
  - Consumer Information
  - Cultural Awareness
  - Current Topics and Titles
  - Formal Learning Support
  - General Information
  - Government Information
  - Information Literacy
  - Lifelong Learning
  - Local History and Genealogy



Since *The New Planning for Results* is a planning process specifically for public libraries, it can be a valuable guide for your planning. The following brief overview of that process summarizes the major steps for long-range planning recommended by the document.

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## PLANNING FOR RESULTS

### Steps and Planning Tasks

#### **PREPARE: Planning to Plan**

Task 1: Design the Planning Process

Task 2: Prepare Board, Staff and Committee

#### **IMAGINE: Identifying Possibilities**

Task 3: Determine Community vision

Task 4: Identify Community Needs

#### **DESIGN: Inventing the Future**

Task 5: Select service responses

Task 6: Write Goals and Objectives

#### **BUILD: Assembling the Future**

Task 7: Identify Preliminary activities

Task 8: Determine Resource Requirement

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## PLANNING FOR RESULTS

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### Steps and Planning Tasks

#### **COMMUNICATE: Informing the Stakeholders**

Task 9: Write the Basic Plan and Obtain Approval

Task 10: communicate the Results of the Planning Process

#### **IMPLEMENT: Moving into the Future**

Task 11: Allocate or Reallocate Resources

Task 12: Monitor Implementation

The following Tool Kits are available:

Groups: Identifying Options

Groups: Reaching Agreement

Library Communication

Presenting Data

### STRATEGIC PLANNING FOR RESULTS

The Public Library Association published *Strategic Planning for Results (2008)*, the fifth planning guide produced since 1980. This process for public libraries includes the planning process, public library services responses, tool kits and workforms. Planning emphasizes the connection between needs that exist in a community and the services that a library offers. Libraries using this planning process should select among eighteen service responses for focus during the planning cycle and identify resource allocations for these services. The service responses listed below describe most of the services offered by public libraries.

- Be an Informed Citizen: Local, National and World Affairs
- Build Successful Enterprises: Business and Nonprofit Support
- Celebrate Diversity: Cultural Awareness
- Connect to the Online World: Public Internet Access
- Create Young Readers: Early Literacy
- Discover Your Roots: Genealogy and Local History
- Express Creativity: Create and Share Content
- Get Facts Fast: Ready Reference
- Know Your Community: Community Resources and Services
- Learn to Read and Write: Adult, Teen, and Family Literacy
- Make Career Choices: Job and Career Development
- Make Informed Decisions: Health, Wealth, and Other Life Choices
- Satisfy Curiosity: Lifelong Learning
- Stimulate Imagination: Reading, Viewing, and Listening for Pleasure
- Succeed in School: Homework Help
- Understand How to Find, Evaluate, and Use Information: Information Fluency
- Visit a Comfortable Place: Physical and Virtual Space
- Welcome to the United States: Services for New Immigrants

Since *Strategic Planning for Results* is a planning process specifically for public libraries, it can be a valuable guide for your planning. The following brief overview of that process summarizes the major steps for long-range planning recommended by the document

## **STRATEGIC PLANNING FOR RESULTS**

### **STEPS**

#### **PLAN TO PLAN**

#### **IDENTIFY SERVICE PRIORITIES**

#### **SET THE STAGE**

#### **DESCRIBE THE FUTURE**

#### **COMMUNICATE THE PLAN**

#### **THE REST OF THE STORY**

The following Tool Kits are available:

- Groups: Identifying Options
- Groups: Reaching Agreement
- Library Communication
- Presenting Data